

SMI Nutrition Review

School Meals Initiative (SMI) for Healthy Children Facts

Effective July 13, 1995, a final rule was implemented which amended the regulations governing the nutrition standards for the National School Lunch and School Breakfast Programs. The final rules require that by the School Year 1996/97, all school lunches and breakfasts are consistent with the recommendations of the *Dietary Guidelines for Americans* (Program Reference Manual Section 14). This rule established specific minimum standards for calories and key nutrients which meals must meet. To assist and provide training for these rules, USDA implemented the School Meals Initiative for Healthy Children.

Menu Planning under SMI

SFAs must use one of four options for menu planning (Program Reference Manual Section 12). The options include:

- Enhanced Food Based Menu Planning
- Traditional Food Based Menu Planning
- Nutrient Standard Menu Planning
- Assisted Nutrient Standard Menu Planning

Different options may be used in different schools and different options may be used for breakfast and lunch in the same school.

Compliance Monitoring

The regulations require that certain nutrients be monitored, to ensure that $\frac{1}{4}$ of the Recommended Dietary Allowance (RDA) has been met for breakfast and $\frac{1}{3}$ of the RDA for lunch, as well as meeting the *Dietary Guidelines for Americans*. The SA will monitor menus for compliance with these

nutritional standards at a minimum of once every five years. A nutrient analysis will be conducted on selected menus for a week for food based menu planning systems. Documentation of data used in nutrient analysis will be reviewed for SFAs using NSMP or ANSMP.

The SMI nutrition review may be conducted at the same time that a CRE is scheduled or done as a separate program review, because they are two separate procedures. SMI provides for technical assistance through the SA to SFAs in planning meals that meet the *Dietary Guidelines for Americans*.

Criteria for meeting the Dietary Guidelines and Nutrient Standards

- Lunch meets $\frac{1}{3}$ of the Recommended Dietary Allowances for protein, vitamin A, vitamin C, iron, calcium, and calories.
- Breakfast meets $\frac{1}{4}$ of the Recommended Dietary Allowances for the above nutrients and calories.
- When averaged over a school week, all school meals contain 30% or less of total calories from fat.
- When averaged over a school week, all school meals contain less than 10% of calories from saturated fat.
- School menus include a reduction in levels of sodium and cholesterol and an increase in dietary fiber.

SFAs not meeting the dietary guidelines and nutrient standards will receive technical assistance from the SA to assist them in developing an improvement plan for meeting the goals of the School Meals Initiative. When it is viewed that the SFA is making a good faith effort to plan healthy meals, reimbursement payments will not be affected.

Weighted Analysis vs. Unweighted Analysis (Simple Averaging)

To accurately analyze the nutritional composition of meals planned for students for lunch and breakfast, regardless of the menu planning option, regulations require that the nutrient analysis of the meals be based on weighted averages. The weighted nutrient analysis allocates a greater proportion of nutrients from foods that are selected more frequently; foods that are selected less frequently will contribute fewer nutrients to the nutrient analysis. Weighting is accomplished automatically by the USDA approved software when the number of planned reimbursable meals and the number of servings of menu items and condiments (by age/grade group) and their serving size are entered for menu analysis.

The feasibility of using an unweighted nutrient analysis (simple averaging) to determine compliance with the nutrition standards is being evaluated by USDA. With a simple average, the nutrients in all foods are given equal weight regardless of the amounts produced of each item.

The Child Nutrition Reauthorization Act of 1998 waived the requirement to use weighted averages for nutrient analysis of school lunches and breakfasts. This waiver applies during the period ending September 30, 2003.

SFAs may choose which method to use should they do nutrient analysis at the SFA level. Please contact the SA for further clarification of the weighted vs. simple averaging method of nutrient analysis.

Weighted Analysis:

The weighted nutrient analysis methodology gives more weight to the nutrients in popular foods that may be frequently selected from a choice or Offer versus Serve menu. This allows for a greater contribution of nutrients to come from the foods selected more frequently. Menu items that are less popular and selected by fewer students will

Table 1 Section 26. Weighted Nutrient Analysis

| Entree Items | Actual Servings Planned | Data Entry Servings Planned | Nutrient Composition |
|---------------|-------------------------|-----------------------------|----------------------|
| Pizza | 200 | 200 | 66.7% |
| Baked Chicken | 50 | 50 | 16.7% |
| Chef's Salad | 50 | 50 | 16.7% |
| Total | 300 | 300 | 100% |

contribute fewer nutrients to the nutrient analysis, as demonstrated in the example above:

The calculation method for computing a weighted nutrient analysis will require the planner to enter (by age/grade grouping):

Total number of planned reimbursable meals for each day for a weekly menu,

Portion size(s) for each menu item/condiment, and

Projected number of servings for each portion size for each menu item which will be part of a reimbursable meal.

Note: Only reimbursable meals are included for nutrient analysis; therefore, the total number of projected servings for each portion size for each menu item and the total number of planned reimbursable meals by age/grade group must not include adult meals or special/a la carte sales.

Simple Averaging:

For nutrient analysis, simple averaging means giving equal weight to every item within each menu choice. If the SFA had no menu choices (such as only one entree choice and the minimum fruit/vegetable requirement), simple averaging for nutrient analysis could be accomplished by planning a menu for one meal and by entering each menu item as one serving. However, there are almost always choices, if for nothing other than milk.

Table 2 Section 26.
Nutritional Analysis Based on Simple Averages

| Entree Items | Actual Servings Planned | Data Entry Servings Planned | Nutrient Composition |
|---------------|-------------------------|-----------------------------|----------------------|
| Pizza | 200 | 300 | 33.3% |
| Baked Chicken | 50 | 300 | 33.3% |
| Chef's Salad | 50 | 300 | 33.3% |
| Total | 300 | 900 | 100% |

The chart above demonstrates giving equal weight in the nutrient analysis for each of three entree choices.

To perform simple averaging for multiple choices, it is necessary to know the portion size as well as the number of choices that will be offered and the number of selections that a student can make within each group of choices. It is not necessary to know the number of student meals planned or the number of servings planned for each menu item by age/grade group. Instead, the number of planned meals entered into the nutrient analysis software should be a number which is easily divisible by the number of choices.

SMI Nutrition Review Information Request

Food Based Menu Planning (Enhanced or Traditional)

The SMI regulation requires that all lunches and breakfasts served under the National School Lunch Program and the School Breakfast Program meet the recommendations outlined in the *Dietary Guidelines for Americans*. In addition, the regulations require that eight key nutrients be monitored to ensure that $\frac{1}{4}$ of the Recommended Dietary Allowance (RDA) has been met for breakfast and $\frac{1}{3}$ of the RDA for lunch.

As part of the SMI nutrition review, nutrient analysis is conducted by the SA to measure the compliance of the SFA with the nutrition standards and the Dietary Guidelines as specified in the regulations. To ensure the most accurate nutrient analysis possible, the most accurate information must be

used as the basis. If accurate documentation is not available, the reviewer will not be able to determine if there was a data entry error or if the SFA needs improvement and guidance with menu planning.

The following documentation must be made available by the SFA for completion or review of a nutrient analysis.

1. A copy of the menu for the school week being reviewed:

The SA will notify the SFA of the specific week that will be reviewed. SFAs have the choice of combining an analysis for breakfast and lunch to be evaluated against nutrient targets combined for breakfast and lunch, or having an analysis done of lunch menus only to be evaluated against lunch nutrient targets. If the combined option is chosen by the SFA, menus for both breakfast and lunch will be needed. In either case, complete menus are needed to ensure an accurate analysis. If changes or substitutions are made to planned menus, those changes need to be indicated. Menus must include all choices of menu items.

2. A copy of the production records used for the school week being reviewed:

Production records must include:

- Site name, meal date, and menu type (breakfast or lunch)
- Forecasted number of meals
- All planned menu items, including milk types and desserts
- All condiments used as a complement to the reimbursable meal (i.e., mustard, salad dressing, margarine, etc.)
- Recipes or food products used (note if USDA recipe), including form of food (i.e., canned, frozen, dried, halves, slices, etc.)
- Brand names and product code numbers of commercially processed foods (for use

by State reviewer in conducting a nutrient analysis)

- Number and size of portions planned for each menu item. Numbers must be provided by age or grade if portion sizes differ for each group.
- Total amount of food prepared for the planned number of servings in purchase units (i.e., number of servings, pounds, cans, etc.)
- Actual number of leftovers and substitutions (indicated in serving size, portion amount, or container size)
- Actual number of reimbursable meals served
- Actual number of non-reimbursable meals served (such as to adults)

3. A copy or printout of all the USDA and local recipes used for the school week being reviewed:

Recipes are needed for any menu item indicated on production records that contains more than one ingredient, such as seasoned vegetables or sandwiches. Recipes must include:

- Yield (including serving size and number of servings)
- All ingredients, including form (i.e., fresh, frozen, or canned), packing medium (i.e., canned in juice or light syrup, frozen with added sugar or plain), and fat content (i.e., 20% fat ground beef, ground pork [no more than 30% fat])
- Correct measures, weights and/or pack size
- Preparation procedures

Note: Foods of minimal nutritional value that are part of a menu item, meaning they are included in the recipe of a menu item, are included in the nutrient analysis.

4. Nutrition information for commercially processed foods:

Commercially processed food items are items such as frozen biscuits, frozen pizza, commercially prepared bread, etc. If the information is not in the child nutrition database there may be a Nutrition Facts label on the package of the product used. This must be saved for documentation.

If the information is not in the database and there is no Nutrition Facts label found on the package, the following information must be obtained from the manufacturer:

- Serving size or cooked weight per serving
- Calories per serving
- Total fat (in grams) per serving
- Total saturated fat (in grams) per serving
- Total protein (in grams) per serving
- Total calcium (in milligrams) per serving
- Total iron (in milligrams) per serving
- Total vitamin A (in Retinol Equivalents (RE) or International Units (IU) per serving
- Total vitamin C (in milligrams) per serving
- Sodium (in milligrams)
- Cholesterol (in milligrams)
- Dietary fiber (in grams)

The manufacturer must indicate if the data submitted is based on an “as served” or “as purchased” basis.

5. Food Product Descriptions:

Food product descriptions must be submitted for each food served so that the appropriate food is picked from the child nutrition database (if the food is included in the database). The food product descriptions can be obtained from the manufacturer.

6. Preparation Instructions:

Preparation instructions must be submitted for each food served which requires preparation, such as baking, frying, sauteing, etc., to assist the reviewer in completing an accurate nutrient analysis.

7. Printout of Nutrient Analysis (if available):

If the SFA uses a food based menu planning system, but uses USDA approved software to conduct a nutrient analysis on their menus, a printout of the nutrient analysis from the SFA can be used for review purposes, if it has been conducted correctly. The SA must review the procedures used by the SFA to conduct the nutrient analysis to determine if the correct methodology has been applied. If the nutrient analysis has not been done correctly, the SA will conduct a re-analysis.

Note: Copies have been provided in this manual of prototypes of a standardized recipe form (Section 27), product nutrition information forms (Section 27), and food production records (Section 8B) with a brief explanation of the information needed to be completed for each. If the food service director/SFA is unsure of what information is being requested or if standard forms have not been utilized, the provided forms may be used for this purpose.

Allowance (RDA) has been met for breakfast and 1/3 of the RDA for lunch.

As part of the SMI nutrition review, the nutrient analysis conducted by the SFA or by a contractor or consultant which has been hired by the SFA will be reviewed by a SA reviewer to measure the compliance of the SFA with the nutrition standards and the *Dietary Guidelines for Americans* as required by the SMI regulation. Accurate documentation will ensure that the nutrient analysis conducted is accurate. The SA reviewer will review this documentation. If accurate documentation is not available, the reviewer will not be able to determine if there was a data entry error or if the SFA needs improvement and guidance with menu planning.

The following documentation must be made available by the SFA for completion or review of a nutrient analysis.

1. Documentation of whether the school used weighting or simple averaging when conducting the nutrient analysis
2. A copy of the menu for the school week being reviewed:

Menus for both breakfast and lunch will be needed for the week specified by the SA. Complete menus are needed to ensure an accurate analysis. If changes or substitutions are made to planned menus, those changes need to be indicated along with the date of the change. Menus must include all choices of menu items.

3. A copy of the production records used for the school week being reviewed. Production records must include:

- Site name, meal date, and menu type (breakfast or lunch)
- Forecasted number of meals
- All planned menu items, including milk types and desserts
- All condiments used as a complement to the reimbursable meal (i.e., mustard, salad dressing, margarine, etc.)

SMI Nutrition Review Information Request

Nutrient Standard or Assisted Nutrient Standard Menu Planning

The SMI regulation requires that all lunches and breakfasts served under the National School Lunch Program and the School Breakfast Program meet the recommendations outlined in the *Dietary Guidelines for Americans*. In addition, the regulations require that eight key nutrients be monitored to ensure that 1/4 of the Recommended Dietary

- Recipes or food products used (note if USDA recipe) including form of food (i.e., canned, frozen, dried, halves, slices, etc.)
- Brand names and product code numbers of commercially processed foods (for use by State reviewer in conducting a nutrient analysis)
- Serving sizes for each menu item of food item served, including condiments. Numbers must be provided by age or grade group if portion sizes differ for each group
- Number of portions planned for each menu item, by age/grade if portion sizes differ
- Total amount of food prepared for the planned number of servings in purchase units (i.e., number of servings, pounds, cans, etc.)
- Actual number of leftovers and substitutions (indicated in serving size, portion amount, or container size)
- Actual number of reimbursable meals served
- Actual number of nonreimbursable meals served (such as to adults)

4. A copy or printout of all the USDA and local recipes used for the school week being reviewed:

Recipes are needed for any menu item indicated on production records that contains more than one ingredient, such as seasoned vegetables or sandwiches. Recipes must include:

- Yield (including serving size and number of servings)
- All ingredients, including form (i.e., fresh, frozen, or canned), packing medium (i.e., canned in juice or light syrup, frozen with added sugar or plain), and fat content (i.e., 20% fat ground beef, ground pork no more than 30% fat)

- Correct measures, weights and/or pack size
- Preparation procedures

Note: Foods of minimal nutritional value that are part of a menu item, meaning they are included in the recipe of a menu item, are included in the nutrient analysis.

5. Nutrition information for commercially processed foods:

Commercially processed food items are items such as frozen biscuits, frozen pizza, commercially prepared bread, etc. Check with the manufacturer that the nutrition information for the product is in the child nutrition database. If the information is not in the database there may be a Nutrition Facts label on the package of the product used. This must be saved for documentation. If the information is not in the database and if there is no Nutrition Facts label found on the package, the following information must be obtained from the manufacturer:

- Serving size or cooked weight per serving
- Calories per serving
- Total fat (in grams) per serving
- Total saturated fat (in grams) per serving
- Total protein (in grams) per serving
- Total calcium (in milligrams) per serving
- Total iron (in milligrams) per serving
- Total vitamin A (in Retinol Equivalents (RE) or International Units (IU) per serving
- Total vitamin C (in milligrams) per serving
- Sodium (in milligrams)
- Cholesterol (in milligrams)
- Dietary fiber (in grams)

The manufacturer must indicate if the data submitted is based on an “as served” or “as purchased” basis.

size form for printing may be found in Section 27. This checklist can assist SFAs as they gather the needed documentation.

6. Food Product Description:

Food product descriptions must be submitted for each food served so that the appropriate food is picked from the child nutrition database (if the food is included in the database). The food product descriptions can be obtained from the manufacturer.

7. Preparation Instructions:

Preparation instructions must be submitted for each food served which requires preparation, such as baking, frying, sauteing, etc., to assist the Reviewer in completing an accurate nutrient analysis.

8. Printout of Nutrient Analysis:

The SFA is required to conduct a nutrient analysis on their menus using USDA approved software. A printout of the nutrient analysis from the SFA can be used for review purposes, if it has been done correctly. The SA must review the procedures used by the SFA to conduct the nutrient analysis to determine if the correct methodology has been applied. If the nutrient analysis has not been done correctly, the SA will conduct a re-analysis.

Note: Copies have been provided in this manual of prototypes of a standardized recipe form (Section 27), product nutrition information forms (Section 27), and food production records (Section 8B) with a brief explanation of the information needed to be completed for each. If the food service director/SFA is unsure of what information is being requested or if standard forms have not been utilized, the provided forms may be used for this purpose.

A summary of the materials needed to conduct a School Meals Initiative Nutrition Review is provided in checklist format in Form 1 Section 26. A full

South Carolina School Food Service Program Reference Manual
Section 26: SMI Nutrition Review

Form 1 Section 26

Checklist of Materials Needed to Conduct a School Meals Initiative Nutrition Review

School Name: _____

Menu Planning Option: _____

School Week Being Reviewed: _____

| Materials Needed to Conduct Review/Analysis | Complete | Additional Data Needed |
|---|----------|------------------------|
| Menus (for the school week being reviewed) | | |
| • choices indicated | | |
| • menu changes or substitutions indicated | | |
| Production Records (for school week being reviewed) | | |
| • site name, meal date, and menu type (breakfast or lunch) | | |
| • all planned menu items, including milk types and desserts | | |
| • all condiments used as a complement to the reimbursable meal (i.e., mustard, salad dressing, margarine, etc.) | | |
| • recipes or food products used including form of food (i.e., canned, frozen, dried, halves, slices, etc.) | | |
| • brand names and product code numbers of commercially processed foods (may be furnished on separate document) | | |
| • serving sizes for each menu item or food item served, including condiments (by age/grade group if portion sizes differ) | | |
| • number of portions planned for each menu item | | |
| • total amount of food prepared for the planned number of servings in purchase units (i.e., number of servings, pounds, cans, etc.) | | |
| • actual number or quantity of leftovers and substitutions | | |
| • actual number of reimbursable meals served | | |
| • actual number of nonreimbursable meals served (adult or guest meals) | | |
| Recipes (for any menu item indicated on production records that contains more than one ingredient) | | |
| • yield (includes serving size and number of servings) | | |
| • all ingredients, including form (i.e., fresh, frozen or canned) and packing medium (i.e., canned in juice or light syrup, frozen with added sugar or plain, and fat content (i.e., 20% fat ground beef) | | |
| • correct measures, weights and/or pack size | | |
| • preparation procedures | | |
| Nutrition information for commercially processed food items | | |
| • "Nutrition Facts" label and/or manufacturer's specifications which include the nutrient content of food. | | |
| • if "Nutrition Facts" label unavailable, obtain the following information from the manufacturer (per serving): | | |
| • serving size or cooked weight; calories; total fat (grams); total saturated fat (grams); total protein (grams); total calcium (milligrams); total iron (milligrams); sodium (milligrams); cholesterol (milligrams); and dietary fiber (grams) | | |
| Food product descriptions | | |
| Preparation Instructions | | |
| Printout of nutrient analysis (if available) | | |

Technical Assistance for Obtaining Manufacturer's Product Information and Nutrition Information

The information needed to complete a SMI nutrition review will be gathered from a number of sources. In addition to menus, recipes, production records, and the child nutrition database, you may need to refer to Nutrition Facts labels and Manufacturer Product Information sheets.

Information found in the child nutrition database may be used directly for menu analysis for simple "generic" type foods like apples and oranges. Also included are nutrient data for USDA standardized recipes, commodity items, and various manufacturer's specific products. If an item is not found in the database, the nutrient information must be obtained by the SFA staff through the collection of Nutrition Facts labels or Manufacturer Product Information sheets.

Many products include a Nutrition Facts label on the packaging. This will provide all of the information needed to complete an analysis of the

target nutrients. The SFA staff may collect actual labels, photocopy labels from the packages, or record the information as given on a separate form for use by State staff. The Nutrition Facts information is presented as "amount per serving" so be sure to compare the serving size given on the label with that served by the school and adjust as necessary when completing the analysis.

Some commercially prepared foods will only be labeled with an ingredient listing while others may also include a CN (Child Nutrition) label. This information is helpful for other reasons, but will not provide the nutrition information needed for the target nutrients in order to complete an analysis. If the item is not "generic" in nature, does not have a Nutrition Facts label, or is not already in the child nutrition database, a Manufacturer's Product Information sheet will need to be obtained. Having a copy of the Nutrition Facts label or a product information sheet for all commercially prepared foods is useful, even for those already in the database, as it will serve to confirm the correct selection of the item used in the analysis even if the nutrient data does not have to be entered.

| Nutrition Facts | | | |
|--|-----------|-----------------------|---------|
| Serving Size 1 cup (228g) | | | |
| Servings Per Container 2 | | | |
| | | | |
| Amount Per Serving | | | |
| Calories 250 | | Calories from Fat 110 | |
| % Daily Value* | | | |
| Total Fat 12g | | 18% | |
| Saturated Fat 3g | | 15% | |
| Cholesterol 30mg | | 10% | |
| Sodium 470mg | | 20% | |
| Total Carbohydrate 31g | | 10% | |
| Dietary Fiber 0g | | 0% | |
| Sugars 5g | | | |
| Protein 5g | | | |
| | | | |
| Vitamin A | | 4% | |
| Vitamin C | | 2% | |
| Calcium | | 20% | |
| Iron | | 4% | |
| * Percent Daily Values are based on a 2,000 calorie diet. Your Daily Values may be higher or lower depending on your calorie needs: | | | |
| | Calories: | 2,000 | 2,500 |
| Total Fat | Less than | 65g | 80g |
| Sat Fat | Less than | 20g | 25g |
| Cholesterol | Less than | 300mg | 300mg |
| Sodium | Less than | 2,400mg | 2,400mg |
| Total Carbohydrate | | 300g | 375g |
| Dietary Fiber | | 25g | 30g |

Table 3 Section 26
Sample Manufacturer's Product Nutrition Information

| Product Name: Cheese Pizza Code Number: 12345 | |
|---|------------------------------|
| Nutrient | Amount per 5.10 oz. serving* |
| Calories | 357.6 |
| Protein | 17.85 g |
| Total Fat | 18.27 g |
| Saturated Fat | 6.637 g |
| Carbohydrate | 29.96 g |
| Dietary Fiber | 1.934 g |
| Calcium | 321.6 mg |
| Phosphorous | 249.0 mg |
| Iron | 2.694 mg |
| Sodium | 930.8 mg |
| Potassium | 782.1 mg |
| Vitamin A | 182.4 RE* |
| Thiamin (vitamin B1) | 0.4115 mg |
| Riboflavin (vitamin B2) | 0.4716 mg |
| Niacin (vitamin B3) | 3.332 mg |
| Ascorbic Acid (vitamin C) | 0.8941 mg |
| Cholesterol | 33.26 mg |

* Nutritional value based on data from Agricultural Handbook Number 8 and chemical analysis.

**Retinol Equivalents=1/3 International Units

Reviewed by: _____, Dietitian

Supplemental Information

Food Production - Preparation - Meal Service Questionnaire

(Sample forms and instructions in Section 26, full size forms in Section 27)

Much of the information used to complete a nutrient analysis will be obtained from menus and production records. With the volume of information being gathered, in the detail required, and often by a number of different individuals, errors and omissions may occur.

The supplemental information questionnaire has been developed to assist in gathering additional detail that may result in a more accurate nutrient analysis. SFA staff answer this questionnaire prior to the actual review or the State reviewer may choose to complete it on site by observation or staff interview. The list of questions applies to the entire SFA food service operation, rather than only the school site being targeted for the SMI Review. Reviewing the list should stimulate thought about what information is needed to yield the most accurate analysis results.

Questionnaire
Page 2

The following questions should be answered for school districts as a whole, not just one school.

1. What variety of milk is offered, and how much of each is purchased in a week?

unflavored:

whole _____
2% _____
1% _____
skim _____
other _____

flavored:

whole _____
2% _____
1% _____
skim _____
other _____

2. What types of dairy products are purchased? Describe each including the % milk fat.

Examples:

American cheese food, cheese spread, cheese product _____
Mozzarella – whole, skim, part skim milk _____
Yogurt _____
Cottage cheese _____
Sour cream _____
Other _____

3. Indicate what commodity foods are used and if frozen or canned.

meats _____ frozen _____ canned _____
fruits _____ frozen _____ canned _____
vegetables _____ frozen _____ canned _____

4. Indicate the fat content of purchased meats.

ground beef _____ %
ham _____ %
pork _____ %
ground turkey _____ %

5. Are canned meats: water packed _____ or oil packed? _____

6. What types of fat are used? Describe each.

salad dressings _____
mayonnaise _____
butter _____
margarine _____
shortening _____
oil _____

Food Production – Preparation – Service – Product Selection and Purchasing Questionnaire

School District: _____

1. Menu Analysis Choice

Menu Analysis will be completed by the SMI Reviewer for a one-week sample of the school district menu, including all reimbursable meals served. The South Carolina Office of School Food Services and Nutrition gives each school district the option of requesting an analysis that:

Choice 1: uses the lunch menus and nutrient targets only, or

Choice 2: combines the breakfast and lunch menus and is evaluated against a combined target nutrient level.

Choice 1 (lunch only) requires the district to provide all documentation needed to complete the analysis in relation to lunch menus only. Choice 2 (combined) requires that documentation be provided for both the breakfast and lunch menus. Due to the complexity of the nutrient analysis process, this choice cannot be changed once the reviewer has begun the nutrient analysis. Indicate your choice by checking the appropriate line and signing this form. Please feel free to contact the Office of School Food Services and Nutrition at (803) 734-8188 if you have further questions about these two options.

____ (Choice 1) The district above requests that the state SMI Reviewer complete a **Lunch Only Nutrient Analysis**.

____ (Choice 2) The district above requests that the state SMI Reviewer complete a **Combined Breakfast/Lunch Nutrient Analysis**.

Food Service Director Signature: _____
Date: _____

2. Make a check next to the menu planning options and planning groups that you use to plan menus for the school(s) that will be reviewed in your district for the SMI Review.

| School Name: | School Name: |
|---|---|
| <input type="checkbox"/> Traditional Food Based Menu Planning | <input type="checkbox"/> Traditional Food Based Menu Planning |
| <input type="checkbox"/> Group I, ages 1-2, Preschool | <input type="checkbox"/> Group I, ages 1-2, Preschool |
| <input type="checkbox"/> Group II, ages 3-4, Preschool | <input type="checkbox"/> Group II, ages 3-4, Preschool |
| <input type="checkbox"/> Group III, ages 5-6, Grades K-3 | <input type="checkbox"/> Group III, ages 5-6, Grades K-3 |
| <input type="checkbox"/> Group IV, ages 9 and older, Grades 4-12 | <input type="checkbox"/> Group IV, ages 9 and older, Grades 4-12 |
| <input type="checkbox"/> Group V, age 12 and older, Grades 7-12, (optional) | <input type="checkbox"/> Group V, age 12 and older, Grades 7-12, (optional) |
| <input type="checkbox"/> Enhanced Food Based Menu Planning | <input type="checkbox"/> Enhanced Food Based Menu Planning |
| <input type="checkbox"/> Ages 1-2 | <input type="checkbox"/> Ages 1-2 |
| <input type="checkbox"/> Preschool | <input type="checkbox"/> Preschool |
| <input type="checkbox"/> Grades K-3 (optional) | <input type="checkbox"/> Grades K-3 (optional) |
| <input type="checkbox"/> Grades K-6 | <input type="checkbox"/> Grades K-6 |
| <input type="checkbox"/> Grades 7-12 | <input type="checkbox"/> Grades 7-12 |
| <input type="checkbox"/> Nutrient Standard Menu Planning | <input type="checkbox"/> Nutrient Standard Menu Planning |
| <input type="checkbox"/> Preschool | <input type="checkbox"/> Preschool |
| <input type="checkbox"/> Grades K-6 | <input type="checkbox"/> Grades K-6 |
| <input type="checkbox"/> Grades 7-12 | <input type="checkbox"/> Grades 7-12 |
| <input type="checkbox"/> Grades K-3 (optional) | <input type="checkbox"/> Grades K-3 (optional) |

Questionnaire
Page 3

7. What varieties of fresh fruit are offered?

8. What varieties of fresh vegetables are offered?

9. What types of canned/frozen vegetables are menued?

10. What types of canned/frozen fruits are menued? Indicate if natural, light, or heavy syrup.

11. Indicate the variety of fruit juices offered, and describe.

portion packs _____
frozen _____
base _____

12. What grain products are used? Provide description and portion weight if possible.

bread – rolls – buns _____
crackers _____
muffins – biscuits – bagels _____
tortillas _____
pancakes – waffles _____
donuts _____

13. What types of rice are used? Example: white, brown, wild, mixture, etc.

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Questionnaire
Page 4

Preparation Techniques and Procedures

1. Are any ground meat dishes prepared using a blend of meats? Such as beef or turkey?
Yes _____ No _____
What ratio of each is used and for which menu items?

2. Is fat being drained from ground meats after cooking? Yes ___ No ___
3. Is visible fat trimmed from raw meats prior to cooking? Yes ___ No ___
4. Are chicken dishes prepared or served with the skin on? Yes ___ No ___
5. Are standardized recipes available and followed? Yes ___ No ___
6. Do different cooks prepare all items the same way? Yes ___ No ___
7. Are fat substitutes such as applesauce or prune puree used in standardized recipes? Yes ___ No ___
If so, for which recipe?

8. Have recipe modifications been made to reduce sugar, salt, or fat? Yes ___ No ___
Indicate which ones.

9. Indicate any foods that are being deep fat fried.

10. Are pasta products being cooked in plain or salted water? Plain ___ Salted ___
11. Is margarine, butter, animal or vegetable oil being added to foods either during the cooking process or prior to service? Yes ___ No ___
List which items.

12. Is milk being added to any product during preparation? If so, indicate what items and the type of milk used. Yes ___ No ___
Examples: mashed potatoes, hot cereals, puddings, soups, whole milk, 2% milk, skim milk, etc.

Questionnaire
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Meal Service

1. What condiments are offered and with which menu items?
Examples:
jelly with toast _____
ketchup with French fries _____
mustard with hot dogs _____
syrup with pancakes _____
dressings with salads _____
cream cheese with bagels _____
other _____
2. Are condiments served in portion control packs or bulk self serve? Yes ___ No ___
What is the portion size of each condiment serving?

3. Are saltshakers available for students to use freely? Yes ___ No ___
4. What items are offered as self-service and what is the average portion size taken?

Additional Resources Available to Collect Needed Information

Sample Prototype Standardized Recipe Form and Instructions

(Sample forms and instructions in Section 26, full size forms in Section 27)

A standardized recipe is one that has been tested for use by a given food service operation and found to produce the same good results and yield when the exact procedures are used with the same type of equipment, and the same quantity and quality of ingredients.

Complete the following information on the standardized recipe form:

- Yield (including serving size and number of servings)
- All ingredients, including form (i.e., fresh, frozen, or canned), packing medium, (i.e., canned in juice or light syrup, frozen with added sugar or plain), and fat content (i.e., 20% fat ground beef)
- Correct measures, weights, and/or pack size
- Preparation procedures

A sample prototype standardized recipe form is provided. The form can be used if the food service director/SFA is unsure of what information to include in their recipes or, if standard forms have not been utilized by the food service director/SFA, the attached form may be used for this purpose.

Form 3 Section 26 Standardized Recipe Form

| | | | |
|---------------------|-------------------------|-------------------------|---------------------------------|
| Recipe Name: | | | |
| Ingredients | ____ Servings | ____ Servings | Preparation Instructions |
| | Weight Measure | Weight Measure | |
| Yield: | | Serving Size: | |

Food Production Records
(Sample forms and instructions in Section 8,
full size forms in Section 27)

Sample prototype food production records are provided with a brief explanation of required information. Three separate types of food production records are included, one for each menu planning option—traditional food based menu planning, enhanced food based menu planning, and NSMP/ANSMP. The forms can be used if the food service director/SFA is unsure of what information to include. Or, if standard forms have not been utilized by the food service director/SFA, the prototype forms may be used for this purpose.

Product Nutrition Information Forms

(Sample forms and instructions in Section 26 and Section 12, full size forms in Section 27)

Sample prototype nutrition information forms are provided. Three separate sample of nutrition information collection forms are included—Nutrition Facts label, Manufacturer’s Product Nutrition Information form, and a Child Nutrition label. These forms will assist in gathering food product descriptions and nutrition information when there are foods served that are not included in the child nutrition database. In these instances, persons conducting a nutrient analysis will need to refer to one or more of these types of nutrition information sources in order to conduct an accurate analysis.

Vendor and Manufacturer Contact Sheet
(Sample form and instructions in Section 26,
full size forms in Section 27)

A sample prototype vendor or manufacturer contact sheet has been included for purposes of obtaining label or product information. This form is useful for listing vendor/manufacturers, contact names, and phone numbers so that they may be directly contacted if a needed label or product information sheet is missing.

[illegible]

Notes: